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Final Report - 2.6-8

Game Meat Market Study
Phase II: Restaurant Survey
Marketing Implications of Phases I and II

Conducted by

Saskatchewan Game Farmers Association

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SASKATCHEWAN GAME FARMERS ASSOCIATION
GAME MEAT MARKET STUDY
PHASE II: RESTAURANT SURVEY
MARKETING IMPLICATIONS OF PHASES I AND II

DECEMBER 1988

THIS PROJECT RECEIVED FUNDING FROM THE
AGRICULTURE DEVELOPMENT FUND

TANKA RESEARCH

INTRODUCTION

In August 1988, Tanka Research was commissioned by the Saskatchewan Game Farmers Association to undertake a study to examine the market potential of game meats in Saskatchewan.

Phase I of the project - Survey of the General Public - was presented to the client under separate cover in September 1988.

This survey of formal dining restaurants represents Phase II of the Project. The principal objective of this phase is to determine the likeliness that this type of Saskatchewan restaurant will serve game meats to its customers.

A prepared questionnaire, developed in conjunction with representatives from the Saskatchewan Game Farmers Association and Saskatchewan Agriculture, was used in the survey. The questionnaire was pretested to ensure clarity and ease of execution, before trained interviewers performed the fieldwork under the guidance of Tanka's supervisory personnel. A copy of the survey instrument is included in the appendix.

Twenty interviews were conducted on December 12 and 13, 1988 from Tanka's telephone center in Regina using a computer assisted interviewing system. Respondents were screened to ensure they were "the person responsible for planning the menu" for the restaurant.

As stipulated by the client, half of the interviews were completed with restaurants in a major urban center - Regina or Saskatoon - and the remaining half were completed in smaller urban centers. Regional telephone directories were used to compile the sample. The sampling of restaurants was approved by the client prior to implementing the survey.

The following is a list of restaurants interviewed.

MAJOR URBAN CENTER

The Diplomat, Regina
Golf's, Regina
Lakeshore, Regina
Ranch Room, Hotel Saskatchewan, Regina
Victoria's, Regina Inn, Regina
The Cottage, Regina
Cousin Nik's, Saskatoon
Villy's, Saskatoon
Greensleeve's, Saskatoon Inn, Saskatoon
Benedict's, Sheraton Center, Saskatoon

SMALLER URBAN CENTER

Hopkin's Dining Parlour, Moose Jaw
The Regal Room, Moose Jaw
Malboro Inn, Prince Albert
Will Inns, Prince Albert
Gladstone Inn, Yorkton
Kavarnia Restaurant, Yorkton
Derrick's Motor Hotel, Estevan
House of Prime Rib, Weyburn
Heritage Inn, Melfort
Hawood Inn, Waskesiu

While difficult to establish statistical reliability with this sample size, it is felt that these twenty restaurants are highly reflective of the small population of formal dining establishments in Saskatchewan.

We are pleased to submit this report, confident that it contains valuable decision-making information for the Saskatchewan Game Farmers Association.

TANKA RESEARCH

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SURVEY HIGHLIGHTS

PAST EXPERIENCES WITH SERVING GAME MEAT

Under the former Captive Wildlife Regulations, a special permit was required to serve game meats in restaurants.

One out of four restaurants surveyed claims to have served game meat at one time or another.

Deer and moose stand out as those types of game meat most frequently served. Customer request is found to be the major factor determining which type of game was offered by the restaurant.

None of the restaurants were serving any game meat at the time of the interviews. The main reasons given relate to a lack of steady demand, and hence these products are offered only as a special menu item.

Similarly, among those restaurants that have never served game meat, a perceived lack of customer demand, or few requests is the main reason provided. This lack of customer demand or requests for game meat could be due, at least in part, by public knowledge of the current legislation governing the sale of game meats.

PERCEPTIONS OF GAME MEAT

Most restaurants see game meats as luxury food items ordered for special occasions, as opposed to a low-cost substitute for beef or pork. In this respect, perceptions are in direct contrast to those of the general public (Tanka, September 1988).

While virtually all restauranteurs say game meats would be less popular than beef or pork, about half concede that the product would likely be a popular menu item among their customers.

The reader is reminded of the results from the Tanka survey of the general public (September, 1988), where some market potential for game meat in restaurants was found. In fact, 11% of the Saskatchewan adults surveyed said they would be very likely to order game meat in a restaurant (an additional 26% said they would be somewhat likely). Furthermore, the level of likeliness was found to be directly related to income, or higher among those customers who would be a prime target for formal dining restaurants.

As for product preparation, while a number of restaurants agree that game meats are usually tougher than beef or pork, most seem to feel it would be easy to prepare the product in a tasty manner.

LIKELINESS OF SERVING GAME MEAT

Eleven out of the twenty restaurants surveyed indicate they would be at least somewhat likely to purchase game meat. In fact, four restaurants (or one in five) say they would be very likely to do so.

A perception of low customer demand for game meats is the main reason provided by those who say they would be unlikely to serve the product in their restaurant.

Cost is found to be a factor, with only half of the likely purchasers (or five respondents) indicating they would continue to buy game meat if it cost twice as much as beef or pork.

The results from the general public survey (September 1988) suggested price sensitivity among consumers as well. For example, 70% of likely purchasers indicated they would still order game meat if restaurants charged slightly more than for beef or pork.

DETERMINING FACTORS

During the interviews, restaurants were informed of Tanka's survey results (namely the percentage of the general public who claim they would likely order game meat in a restaurant). This had little impact in swaying the decision of those restaurants who indicated they would be unlikely to purchase game meat.

The results did appear to have a greater impact to restauranteurs in smaller centers. This is likely due to the fact that there are fewer restaurants in these centers competing for the dining-out dollars, than in Regina or Saskatoon.

The idea of buying game meat from local ranches has some appeal for unlikely restaurant purchasers. However, these findings may not translate into actual purchases, given that their resistance to serving the product stems from a perceived lack of customer demand.

Turning to production and slaughter methods, and the guarantee of a regular supply from producers, these are found to be stronger considerations among likely purchasers.

For example, strong agreement is found among this group to the following statements:

> "I would buy game meat if production and slaughter were subject to the same inspection and grading as beef or pork."
>
> and
>
> "I would buy game meat if I could be guaranteed a regular supply from producers."

MARKETING IMPLICATIONS OF PHASES I AND II

Like any other product, perceived customer demand is found to be the biggest factor in determining, what type of game meat, if any, will be served in restaurants. Given the fact that few of the likely purchasers have ever served game meat, coupled with the sentiment that game meats are luxury items ordered for special occasions, it is likely that those who agree to buy the product will do so initially only on a trial basis.

The results indicate that the restaurant market is worth pursuing. Obviously, there are a number of measures that can be undertaken by the industry in order to build the game meat market, and to ensure a successful undertaking by all parties involved.

Similarly, the results from Phase I of this project suggest that steps will need to be undertaken, in conjunction with restaurants, to promote the product to customers. While restaurants may agree to purchase game meat, this may not necessarily translate into a steady, lucrative market for the game meat industry. Should customer demand be too small to warrant the offering, repeat buying by restaurants is unlikely.

Based on the results from Phases I and II, it is the author's belief that one year should be spent to increase exposure to properly prepared game meats prior to any mass marketing attempt. During the first year of the marketing plan, a certain degree of control will be necessary if the public's experience with the product is to be positive. Obviously, a dissatisfied customer will never buy game meat again, much less recommend it to others.

A year should be spent on the following type of plan before people are exposed to the products in grocery stores. This way, people will learn that properly prepared game meats can be tasty. At the same time, if game meat is purchased in stores and prepared improperly, consumers will be more likely to blame their own preparation and not the product itself.

Furthermore, at least two "game meat reps" will be required for sales and service. In many ways, they will be filling roles similar to the standard liquor representative - dealing with restaurants, associations, etc. on a regular and personal basis to monitor sales and solve any problems. Like any new business, much depends on the quality of the people who are employed.

A/ Target: Restaurants

- Make one-year deals with one or two select restaurants in both Saskatoon and Regina, and a few other first-class dining rooms around the province. These could include certain premiere stand-alone restaurants like Golf's or The Diplomat, or major hotels, convention facilities, or the more exclusive private club facilities (i.e. Assiniboia Club, Saskatoon Club, Wascana Country Club, Riverside Golf & Country Club).

The deals must be exclusive. Striking a deal with every restaurant in a city or community, could mean a loss in controls and an ineffective plan.

- Provide guaranteed product at low-cost for one year to allow high mark-up for selected restaurants. It will be in the Association's best interests in the long run to ensure that any decision made by a restaurant to serve game meat will be a profitable one.

- Make efforts for staff, including waiters, to sample products and recommend them.

- Make efforts and/or provide additional incentives for restaurants to suggest the products for banquet and group functions.

- Work directly with owners and chefs to ensure quality preparation and presentation. Any subsequent customer criticism or complaints may not be due to the product, but rather to how it was prepared or presented.

- Present game meat entrees as specials on the menu. Print "special" cards for selected restaurants to attach to their existing menus.

- Compliment participating restaurants in any advertising done by the Association (i.e. "available at these fine restaurants...").

- Monitor each selected restaurant to ensure promotion, product delivery and integrity, preparation and presentation, variety of new ideas and selections, and to solve problems or answer questions.

B/ Target: Conferences and Conventions

- Write to major hotels and conference facilities, offering incentives and assistance for serving the products at functions. Then work closely with them to ensure high quality preparation and presentation at each function.

- Write to various business associations, clubs and other groups around the province to offer them incentives and assistance for serving game meats at their conferences and conventions. This could be sold as a unique addition to any meeting, and a way of showing off Saskatchewan to visitors.

- Write to various ethnic clubs and associations, known to be more predisposed to serving game meat (i.e. people of European descent), to offer incentives for serving the product at their functions or special events.

- Regular communications with public relations firms, convention organizers, and bureaus to determine convention planning. Pitch every conference or convention on the idea of something uniquely Saskatchewan as opposed to the standard rubber chicken.

If these measures are properly executed, within a year, other restaurants will notice, and may experience increased demand or requests. This, in turn, may make them more likely to consider adding game meats to their menus, assuming a reliable supply of quality product is easily available. Meanwhile, many more people will have tasted properly prepared game meats, and thus, both the restaurant and grocery demand should have increased.

1.0 MEAT BUYING PRACTICES

Respondents were asked two questions to determine their restaurant's meat buying practices. The first deals with their meat source, the second with the frequency of meat purchases.

All respondents report to purchase their meat from either a wholesaler (thirteen respondents) or a meat plant (seven respondents).

The majority of restaurants surveyed (sixteen out of twenty) claims to purchase their meat in a week's supply. This is found to be the case among both samples, as shown in Table 1 below.

"Does your restaurant usually purchase meat..." (Choices read)

TABLE 1

QUANTITY OF MEAT PURCHASED BY RESTAURANT ACCORDING TO COMMUNITY SIZE

n = 20	% of Total	NUMBER OF RESPONSES Total	Major Center	Small Center
In single quantities for the day required	-	-	-	-
A two or three day supply	10	2	2	-
A week's supply	80	16	6	10
A two week's supply	10	2	2	-

2.0 PAST PRACTICES WITH RESPECT TO SERVING GAME MEAT

Five out of the twenty restaurants surveyed indicate game meat has been served in their restaurant at one time or another. Three are in Regina, while two are in a small urban center.

The most popular types of game meat served by these restaurants include deer and moose (at three responses each), followed by elk (one response). None of the restaurants report to have ever served antelope.

When asked why they chose to serve that particular type of game meat, virtually all stated it was at the request of their customers.

These respondents were also asked whether they still offer game meat on their menu. All indicate they do not. The reasons given include:

- no demand or requests (two restaurants in Regina).
- offered only as a special menu item (two restaurants in smaller centers).
- game meat is too expensive (one restaurant in Regina).

The fifteen respondents who say they have never served game meat in their restaurant were asked to provide their reasoning. Resulting responses are shown in Table 2 below.

"What would you say is the main reason game meat has never been served in your restaurant?" (Free response)

TABLE 2

REASON WHY GAME MEAT HAS NEVER BEEN SERVED
ACCORDING TO COMMUNITY SIZE

n = 15	% of Total	NUMBER OF RESPONSES Total	Major Center	Small Center
No demand/requests	60	9	5	4
Not government inspected/ against the law	27	4	1	3
Too expensive	13	2	1	1

Lack of demand or customer requests is the most frequent reason among both samples.

Furthermore, the fact that game meat is not government inspected is found to be a strong factor among those in small urban centers.

3.0 PERCEPTIONS OF GAME MEAT

3.1 Popularity Among Customers

The majority (sixteen out of twenty) perceives game meats as luxury food items ordered for special occasions, as opposed to low-cost substitutes for beef or pork.

As shown in Table 3, little difference is found among the two samples in this regard.

"Do you perceive game meats more as luxury food items ordered for special occasions, or low-cost substitutes for beef or pork?"

TABLE 3

PERCEPTION OF COST OF GAME MEAT ACCORDING TO COMMUNITY SIZE

n = 20	% of Total	NUMBER OF RESPONSES Total	Major Center	Small Center
Luxury food items	80	16	8	8
Low-cost substitutes	20	4	2	2

Similarly, virtually all respondents say game meats would be less popular to their customers than beef or pork.

"And how popular do you think game meats would be to your customers..." (Choices read)

TABLE 4

POPULARITY OF GAME MEATS AMONG CUSTOMERS ACCORDING TO COMMUNITY SIZE

n = 20	% of Total	NUMBER OF RESPONSES Total	Major Center	Small Center
More popular than beef or pork	-	-	-	-
Less popular than beef or pork	95	19	9	10
About as popular as beef or pork	5	1	1	-

Nevertheless, half of the respondents agree at least somewhat with the suggestion that game meat would be a popular menu item among their customers.

"Game meats would be a popular menu item among my customers."

TABLE 5

POPULARITY OF GAME MEATS AMONG CUSTOMERS
ACCORDING TO COMMUNITY SIZE

		NUMBER OF RESPONSES		
n = 20	% of Total	Total	Major Center	Small Center
Agree strongly	5	1	1	-
Agree somewhat	45	9	4	5
Disagree somewhat	20	4	2	2
Disagree strongly	5	1	-	1
No opinion	25	5	3	2

3.2 Ease of Preparation

Respondents were also read a series of statements regarding the ease of preparing game meats.

Most disagree with the statement that game meats would be difficult to prepare in a tasty manner. This is found to be the case among both groups, as shown in Table 6 below.

"Game meats are difficult to prepare in a tasty manner."

TABLE 6

GAME MEATS DIFFICULT TO PREPARE IN A TASTY MANNER
ACCORDING TO COMMUNITY SIZE

n = 20	% of Total	NUMBER OF RESPONSES Total	Major Center	Small Center
Agree strongly	15	3	2	1
Agree somewhat	10	2	-	2
Disagree somewhat	20	4	1	3
Disagree strongly	55	11	7	4
No opinion	-	-	-	-

There appears to be less consensus among respondents over the question of meat tenderness. As shown in Table 7, seven respondents agree that game meats are usually tougher than beef or pork, while twelve take the opposing view.

"Game meats are usually tougher than beef or pork."

TABLE 7

GAME MEATS USUALLY TOUGHER
ACCORDING TO COMMUNITY SIZE

n = 20	% of Total	NUMBER OF RESPONSES Total	Major Center	Small Center
Agree strongly	15	3	2	1
Agree somewhat	20	4	2	2
Disagree somewhat	25	5	2	3
Disagree strongly	35	7	3	4
No opinion	5	1	1	-

4.0 LIKELINESS OF SERVING GAME MEAT

Respondents were also asked how likely they would be to purchase game meat for their restaurant if they could be guaranteed a fresh supply from producers.

Just over half of the restaurants surveyed say they would be at least somewhat likely to do so (very likely - four respondents; somewhat likely - seven respondents).

Table 8 analyzes likeliness according to community size.

"If a guaranteed fresh supply of game meat were available from producers, how likely would your restaurant be to purchase it?"

TABLE 8

LIKELINESS OF PURCHASING GAME MEAT
ACCORDING TO COMMUNITY SIZE

		NUMBER OF RESPONSES		
n = 20	% of Total	Total	Major Center	Small Center
Very likely	20	4	3	1
Somewhat likely	35	7	2	5
Somewhat unlikely	20	4	1	3
Very unlikely	20	4	3	1
Can't say	5	1	1	-

Further analysis of "likely purchasers" shows the following:

- nine out of the eleven have never served game meat in their restaurant before.
- all of the eleven respondents perceive game meat as luxury food items ordered for special occasions.
- of the "very likely" purchasers in major centers, two are in Saskatoon, the other is in Regina.

These respondents were then asked which type of game meat their restaurant would tend to purchase most frequently.

Deer is the most frequent response at five responses, followed by elk (two responses), and antelope and moose (measured at one response each). It is noteworthy that both restaurants suggesting elk are in smaller urban centers.

Virtually all (ten out of eleven) say they would buy only certain cuts of game meat, as opposed to buying by the carcass or half-carcass (one respondent).

Steaks (nine respondents) and roasts (nine respondents) are the most frequently suggested cuts of game meat that would be purchased.

The eight respondents who had earlier indicated they would be unlikely to purchase game meat for their restaurant were asked to supply their reasoning.

Seven respondents indicate there is no demand for game meats in their restaurant, while one suggests it is too expensive.

5.0 DETERMINING FACTORS

5.1 Cost

Respondents expressing a likeliness to purchase game meat were asked whether they would still purchase the product if it cost slightly more than beef or pork. All indicate they would.

When asked whether they would still purchase game meat for their restaurant if it cost twice as much as beef or pork, only five out of the eleven indicate they would continue to do so. Little difference is found between the two groups in this regard.

This represents one in four restaurants surveyed who would continue to purchase game meat if it cost twice as much as beef or pork.

5.2 Popularity Among the Public

Respondents were informed of the results of the market survey undertaken by Tanka (September, 1988), namely those relating to the percentage of the general public who would likely order game meats in restaurants. All were then asked whether the research findings made any difference to their decision to serve game meat in their restaurant.

As shown in Table 9 on the following page, the survey results appear to have little impact on unlikely purchasers.

"In a recent telephone survey undertaken by an independent research company, 11% of the Saskatchewan adults surveyed said they would be very likely to order game meat if it were available in restaurants. This figure, which represents about 75,000 adults, was relatively consistent across the province, and found to be higher among people in the 30-44 age category and these earning higher levels of income. The overriding factors for ordering game meats were found to be menu variety and taste.

Do these findings make you more likely to serve game meats in your restaurant, or does it make little difference to you?"

TABLE 9

IMPACT OF SURVEY RESULTS
ACCORDING TO LIKELINESS OF PURCHASE

n = 20	% of Total	NUMBER OF RESPONSES Total	Likely	Unlikely	D.K.
More likely	40	8	6	1	1
No difference	50	10	4	6	-
Can't say	10	2	1	1	-

Further analysis of the data does suggest that the findings have a greater impact on those in smaller urban communities (60% say they would be more likely), than on those in larger centers (20% say they would be more likely).

5.3 Production and Inspection

Half of all respondents suggest they would be more likely to purchase game meat if it came from local ranches.

As shown in Table 10, this appears to be a stronger consideration among unlikely purchasers.

"In some places, game ranching is a growing industry. Would you be more likely to purchase game meats like elk, moose, antelope or deer, if it came from local ranches, the same as beef or pork, or would that make no difference in your decision to serve game meats?"

TABLE 10

SUPPORTING LOCAL RANCHES
ACCORDING TO LIKELINESS OF PURCHASE

n = 20	% of Total	NUMBER OF RESPONSES Total	Likely	Unlikely	D.K.
More likely	50	10	4	5	1
No difference	50	10	7	3	-

Seven out of the twenty restaurants surveyed strongly agree that they would buy game meat if they could be guaranteed a regular supply from producers.

From the data in Table 11, it is clear that this feature is particularly attractive to likely purchasers.

"I would buy game meat if I could be guaranteed a regular supply from producers."

TABLE 11

GUARANTEE OF A REGULAR SUPPLY
ACCORDING TO LIKELINESS OF PURCHASE

n = 20	% of Total	NUMBER OF RESPONSES Total	Likely	Unlikely	D.K.
Agree strongly	35	7	7	-	-
Agree somewhat	20	4	2	2	-
Disagree somewhat	10	2	-	2	-
Disagree strongly	10	2	-	2	-
No opinion	25	5	2	2	1

Not surprising, production and slaughter methods are found to be important factors, particularly among likely purchasers.

As shown in Table 12, most agree that they would buy game meat if production and slaughter were subject to the same inspection and grading as beef or pork. In fact, half agree strongly with the suggestion.

"I would buy game meat if production and slaughter were subject to the same inspection and grading as beef or pork."

TABLE 12

INSPECTION AND GRADING
ACCORDING TO LIKELINESS OF PURCHASE

n = 20	% of Total	NUMBER OF RESPONSES Total	Likely	Unlikely	D.K.
Agree strongly	50	10	9	1	-
Agree somewhat	30	6	1	5	-
Disagree somewhat	10	2	1	1	-
Disagree strongly	5	1	-	1	-
No opinion	5	1	-	-	1

Given that resistance among unlikely purchasers stems from anticipated demand, it is not surprising that production and slaughter methods, and a guaranteed supply from producers (Table 11), should have little impact in influencing their decision.

6.0 GENERAL SUPPORT FOR GAME RANCHING

In a closing question, all respondents were asked whether they felt game ranching is a good or poor idea.

The majority (sixteen out of twenty) suggests it is a good idea, while only three respondents say it is a poor one.

Those who suggest it is a poor idea were asked to supply a reason. Three different responses were provided, as shown in Table 13 below.

"Why do you feel it is a poor idea?"

TABLE 13

REASON WHY GAME RANCHING IS A POOR IDEA

n = 20	NUMBER OF RESPONDENTS	
Good idea	16	
Can't say	1	
Poor idea	3	
No demand		1
Meat would taste domestic		1
People prefer hunting it		1

GAME MEAT RESTAURANT SURVEY
(Final Draft)

Hello, my name is _____, with Opinion Research and we're calling restaurants at random to get their views on customer meat preferences.

Could I speak to the person in your restaurant who is responsible for planning the menu?

1. Is the meat served in your restaurant usually purchased...

1__ from a butcher shop or meat store? (skip to #3)
2__ or from some other source?

2. Specify "other source".

1__ from farmer/rancher
2__ other (please specify)_____

3. Does your restaurant usually purchase meat...

1__ in single quantities for the day it is required?
2__ a two or three day supply?
3__ a week's supply?
4__ a two-week supply?
5__ a month's supply?
6__ or in larger quantities to last more than a month?

4. Has game meat such as elk, antelope, deer or moose ever been served in your restaurant?

1__ yes
2__ no (skip to #9)

5. Which of those types of game meat - elk, antelope, deer or moose - have ever been served in your restaurant? (multiple response)

1__ elk
2__ antelope
3__ deer
4__ moose

6. Is there any particular reason why you chose to serve that type over others?

1__ preference/ requests by customers
2__ availability
3__ other (please specify)_____

7. Do you presently offer game meat on your menu?

1__ yes (skip to #10)
2__ no

8. What would you say is the main reason you no longer offer it?

_____
(skip to #10)

9. What would you say is the main reason game meat has never been served in your restaurant?

_____

10. Do you perceive game meats more as.....

1__ luxury food items ordered for special occasions?
2__ or low-cost substitutes for beef or pork?

11. And how popular do you think game meats would be to your customers.....

1__ more popular than beef or pork?
2__ less popular than beef or pork?
3__ or about as popular as beef or pork?

12. If a guaranteed, fresh supply of game meat were available from producers, how likely would your restaurant be to purchase it?

1__ very likely?
2__ somewhat likely?
3__ somewhat unlikely? (Skip to #18)
4__ or very unlikely? (Skip to #18)
5__ can't say (Skip to #19)

13. And which type of game meat would your restaurant tend to purchase most frequently.....

1__ deer?
2__ antelope?
3__ elk?
4__ or moose?
5__ can't say

14. Would you tend to buy game meat by the carcass or half-carcass, or only certain cuts?

1__ carcass/half-carcass (skip to #16)
2__ certain cuts
3__ can't say

15. Which of these cuts would your restaurant likely purchase? (Multiple response)

1__ steaks?
2__ burgers?
3__ roasts?

16. If game meat cost slightly more than beef or pork, would you still be likely to purchase it?

1__ yes
2__ no (Skip to #19)

17. If game meat cost twice as much as beef or pork, would you still be likely to purchase it?

1__ yes
2__ no

(Skip to #19)

18. What would you say is the main reason you might be unlikely to purchase game meat for your restaurant?

_____

19. In a recent telephone survey undertaken by an independent research company, 11% of the Saskatchewan adults surveyed said they would be very likely to order game meat if it were available in restaurants. This figure, which represents about 75,000 Saskatchewan adults, was relatively consistent across the province, and found to be higher among people in the 30-44 age category and those earning higher levels of income.

The overriding factors for ordering game meats were found to be menu variety and taste.

Does this finding make you more likely to serve game meat in your restaurant, or does it make little difference to you?

1__ more likely 2__ no difference 3__ can't say

20. In some places, game ranching is a growing industry. Would you be more likely to purchase game meats like elk, moose, antelope or deer, if it came from local game ranches, the same as beef or pork, or would that make no difference in your decision to serve game meats?

1__more likely 2__no difference 3__can't say

(21.) Now I'd like you to say whether you agree or disagree with a number of statements restaurant owners have made on this topic. Also whether you agree or disagree strongly or only somewhat. The first statement is...(Items rotated)

	AGREE		DISAGREE	
	Strongly	Somewhat	Somewhat	Strongly
21. Game meats are difficult to prepare in a tasty manner.				
22. Game meats would be a popular menu item among my customers.				
23. Game meats are usually tougher than beef or pork.				
24. Game meats contain less fat than beef or pork.				
25. I would buy game meat if production and slaughter were subject to the same inspection and grading as beef or pork.				
26. I would buy game meat if I could be guaranteed a regular supply from producers.				

27. In your opinion, is game ranching - the farming of native game species for meat production, a good idea or a poor one?

1__good idea (skip to #29)
2__poor idea
3__can't say (skip to #29)

28. Why do you feel it is a poor idea?

And finally, just a few statistical questions:

29. Is your restaurant...

1__ in a town of less than 5,000 people?
2__ in a city with 5,000 to 10,000 people?
3__ or in one of the four cities with over 20,000 people?

30. Approximately how much was your restaurant's gross sales for last year...

1__ under 25 thousand?
2__ 25 to 50 thousand?
3__ or over 50 thousand?